LeanMAX

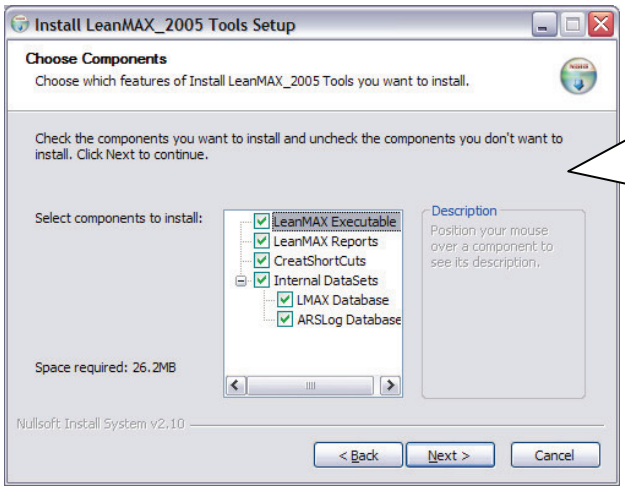
Users Manual

Version 2006 for MAX v4

Standard Configuration

Table of Contents:

Installation:



Install by running InstallLeanMAX_2005.EXE and follow the prompts for where you LeanMAX installed.

The current MAX paths will be retrieved from the local registry and can be changed as need using the Data Settings tab. The registry can be found under Settings. Enter the name and password supplied with the software.

MAX Business Logic:

1. LeanMAX uses MAXUpdate for processing standard transactions. MAXUpdate is a set of DLL's that provide a library of MAX functions. MAXUpdate is a separate module provided by Exact, please consult with the MAXUpdate documentation for more information.
2. Copy the following MAXUpdate files into the application folder or make them available from a search path:

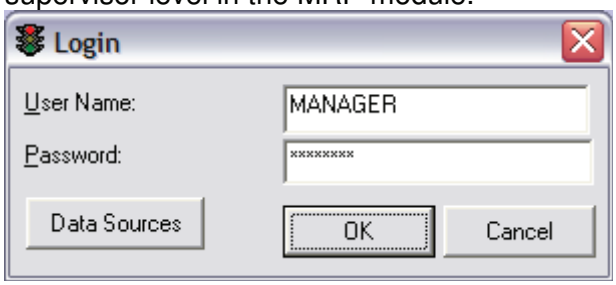
MAX DLL'S
MAXEXEC2 DLL
MAXBTRV2 DLL
MAXTRAN2 DLL
MAXORDR2.DLL

MAXORD2.DLL is only needed for KANBAN functions.

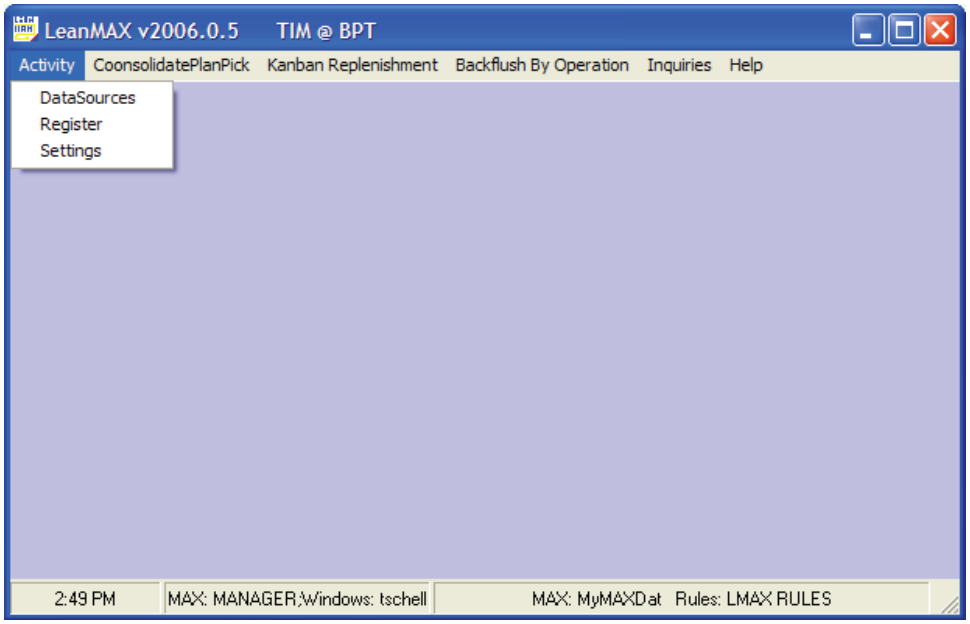
These files will be installed by the MAX Client Setup routine in \MAX\MFW2 and will reside in the server in \EXACT\MAX\NET\UPDATES\MFW2. As MAX is updated it is important to also update the files that are used by this application.

Login:

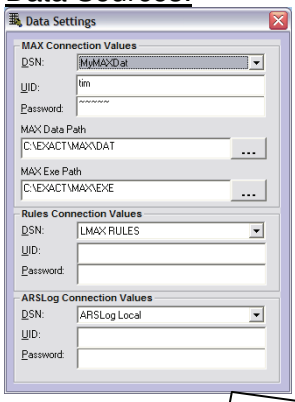
The user and password will be verified with the MAX Security table and requires the user to have a supervisor level in the MRP module.



Main Menu:

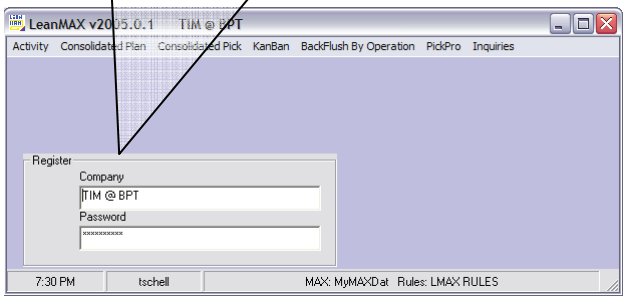


Data Sources:



Register:

Enter the Company and Password keys for your site.



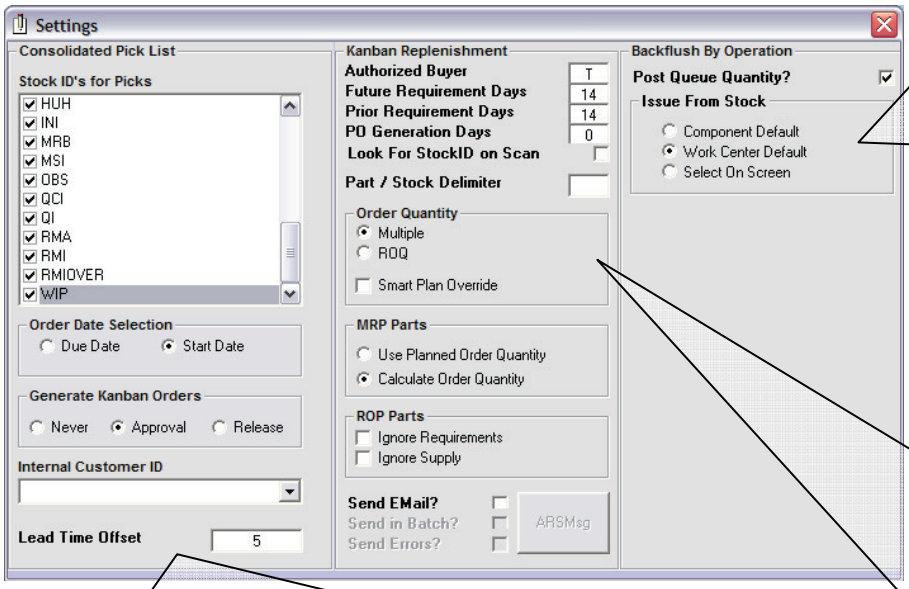
1. MAX DSN, Data and EXE locations.

2. Rules Database DSN - LMAX RULES will be generated initially for LMAX.MDB located in the \Data folder within the installed to folder for the application.

3. ARSLog Database DSN - ARSLog Local will be generated initially for ARSLog.MDB located in the \Data folder when the ARSMsg application is first started. See KanBan settings. *This database is only required if using Kanban processing with automatic emails.*

Settings:

This form is used to select switches and parameters. These switches are stored in the LMAX database.



Back Flush by Operation:

1. Update the Job Progress Queue quantity.
2. Select default issue from location.

KanBan:

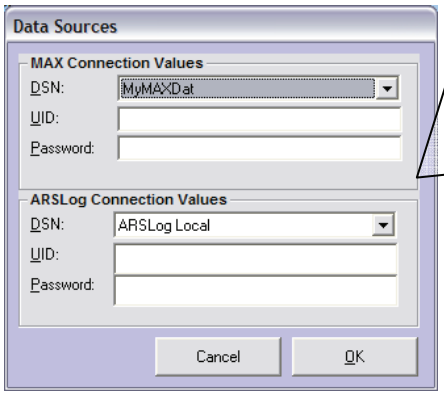
1. Authorized Buyer – partial match allowed.
2. Due Past / Prior – date horizon.
3. PO Generation Days - if an existing PO is found within this time frame it will be added to.
4. Look For Stock ID on Scan – scan contains both part and stock ID separated by a delimiter.

Stock ID's for Picks: this Stock ID's selected here determine which orders are selected in the Pick process. Only Orders with requirements having a default Stock ID on this list will display. Selected Stock ID's have UDFKEY_05 set to ".cp.".
Order Date Selection: determines the date sequence of the Planning Screens.
Generate Kanban Orders: select whether to generate Kanban type supply orders and at approval or release.
Internal Customer ID: Identify the internal customer ID to be used to cross reference Model with Part ID using the Customer Part Data table which is maintained as part of part sales.

ARSMsg:

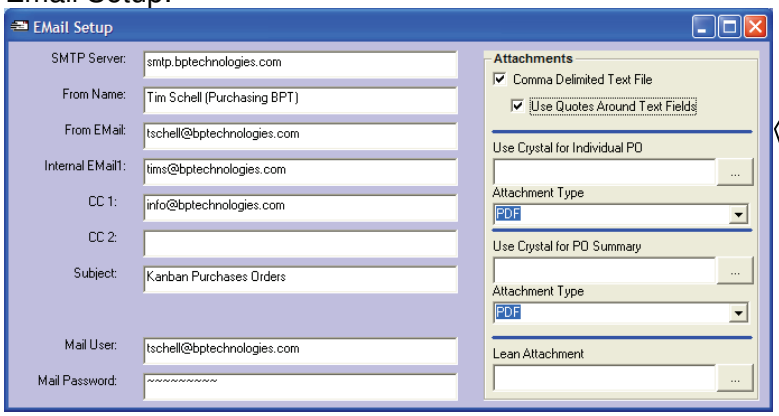
Utility that is used to send emails.

Data Source:

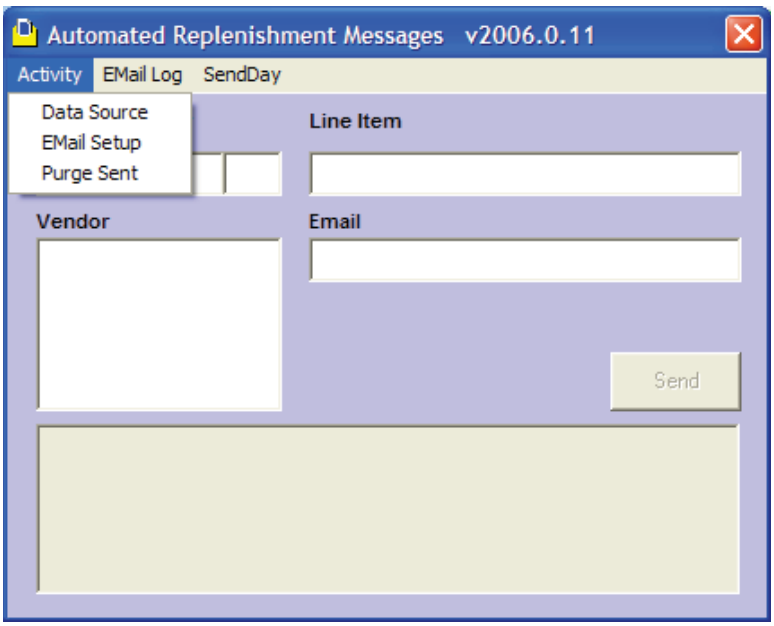


1. Enter MAX DSN, ODBC User, and Password if used.
2. ARSLog DSN, User and Password.

Email Setup:



1. Enter the SMTP outbound eMail server.
2. Enter the From display name and From Email address.
3. Enter the Internal Email address (for exceptions) – these are optional.
4. Enter CC addresses.
5. Enter Subject
6. Mail User and Password
7. Enter the Individual PO Crystal and attachment type.
8. Enter the Summary PO Crystal Name and attachment type.
9. If using Lean Turn Around with Lean Vouchering end the name of the Crystal. This Crystal will be used to export an Excel file for turnaround as a ship document by the vendor. The default Crystal is: **LeanMAXTurnAround.rpt** and is installed within the \Reports folder.

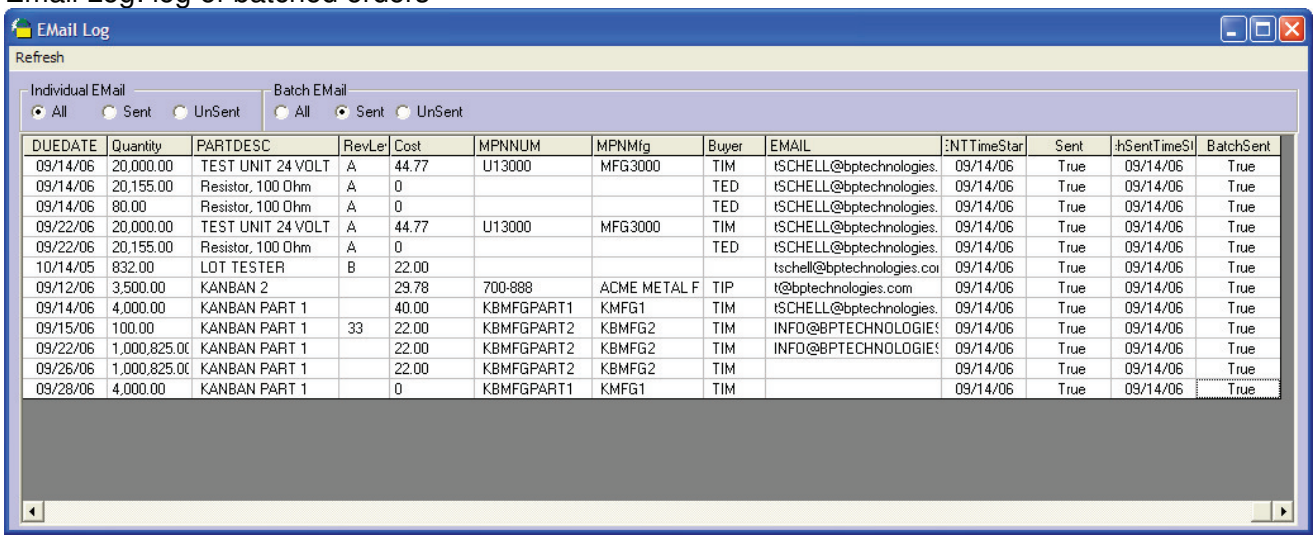


The main form can be used to send a simple email based on the selected Purchase Order. The Vendor's Email address is the default, but can be changed on the form.

The SendDay function is used to send the accumulated emails grouped by vendor.

As a scheduled function use ARSMSG.EXE SENDDAY in the command line.

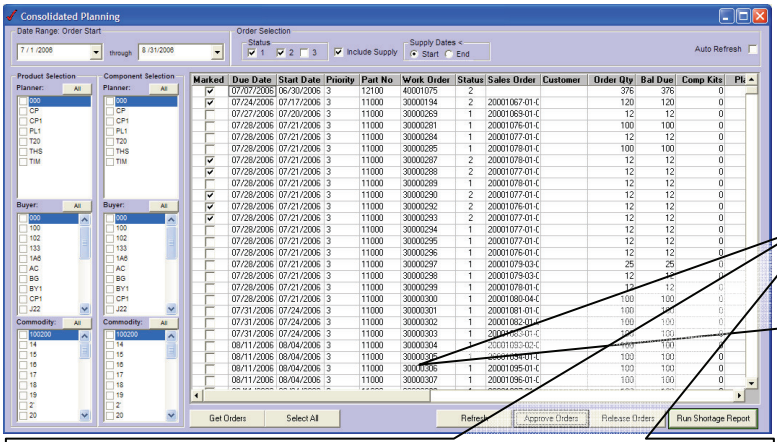
Email Log: log of batched orders



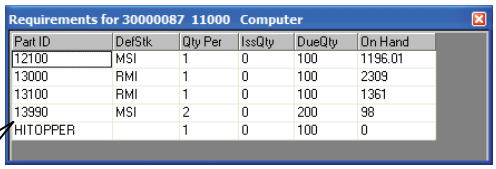
DUEDATE	Quantity	PARTDESC	RevLe	Cost	MPNNUM	MPNMfg	Buyer	EMAIL	NTTimeStar	Sent	hSentTimeSt	BatchSent
09/14/06	20,000.00	TEST UNIT 24 VOLT	A	44.77	U13000	MFG3000	TIM	tSCHELL@bptechnologies.	09/14/06	True	09/14/06	True
09/14/06	20,155.00	Resistor, 100 Ohm	A	0			TED	tSCHELL@bptechnologies.	09/14/06	True	09/14/06	True
09/14/06	80.00	Resistor, 100 Ohm	A	0			TED	tSCHELL@bptechnologies.	09/14/06	True	09/14/06	True
09/22/06	20,000.00	TEST UNIT 24 VOLT	A	44.77	U13000	MFG3000	TIM	tSCHELL@bptechnologies.	09/14/06	True	09/14/06	True
09/22/06	20,155.00	Resistor, 100 Ohm	A	0			TED	tSCHELL@bptechnologies.	09/14/06	True	09/14/06	True
10/14/05	832.00	LOT TESTER	B	22.00				tschell@bptechnologies.co	09/14/06	True	09/14/06	True
09/12/06	3,500.00	KANBAN 2		29.78	700-888	ACME METAL F	TIP	t@bptechnologies.com	09/14/06	True	09/14/06	True
09/14/06	4,000.00	KANBAN PART 1		40.00	KBMFGPART1	KMFG1	TIM	tSCHELL@bptechnologies.	09/14/06	True	09/14/06	True
09/15/06	100.00	KANBAN PART 1	33	22.00	KBMFGPART2	KBMFG2	TIM	INFO@BPTECHNOLOGIE	09/14/06	True	09/14/06	True
09/22/06	1,000,825.0	KANBAN PART 1		22.00	KBMFGPART2	KBMFG2	TIM	INFO@BPTECHNOLOGIE	09/14/06	True	09/14/06	True
09/26/06	1,000,825.0	KANBAN PART 1		22.00	KBMFGPART2	KBMFG2	TIM		09/14/06	True	09/14/06	True
09/28/06	4,000.00	KANBAN PART 1		0	KBMFGPART1	KMFG1	TIM		09/14/06	True	09/14/06	True

Consolidated Plan and Pick:

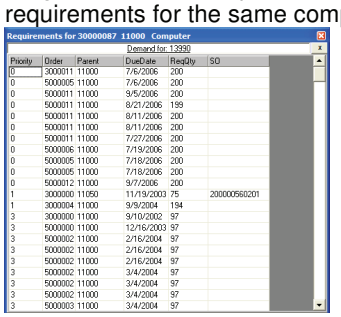
Planning Function:



A right click on any line will display the requirements detail related to the work order.



A right click on the requirements tab will show all other requirements for the same component.

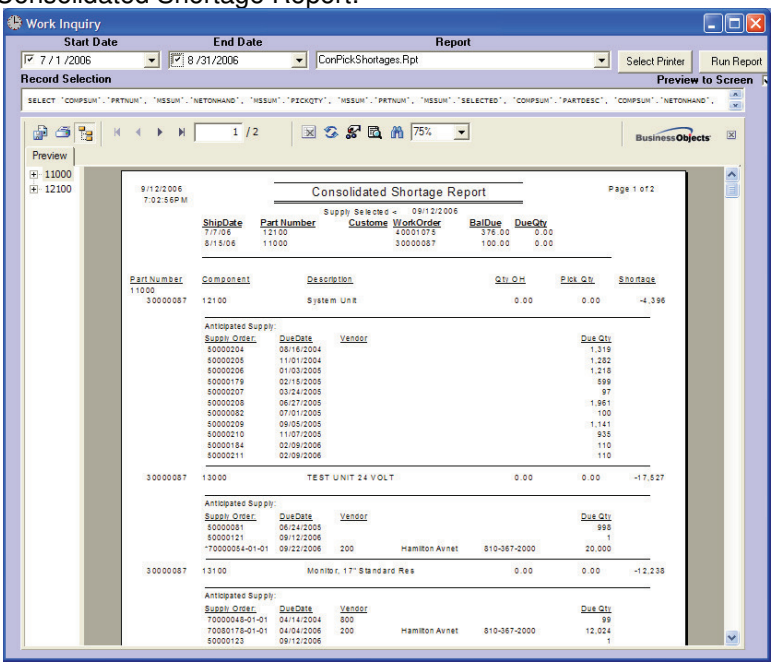


Date Range: can be set to use either the Order Due Date or the Order Start date which is defined as the due date less the part lead time. The date used is determined in the Settings Tab.
Product Selection: work orders with parts that match the 3 selection boxes are included. If none are selected the selection criteria for the box is empty, meaning there is no selection taking place for this parameter.
Component Selection: similar to Product except that the selection is based on the parts in the order requirement detail table. Only orders with match requirements will be selected.
Order Status: orders are selected based on their status codes (STATUS_10)
Include Supply: if selected the current on hand balances of component requirements are augmented by the total DUEQTY_10 of all supply orders with a STATUS_10 =”3” and CURDUE_10 <= the To Date on the form.

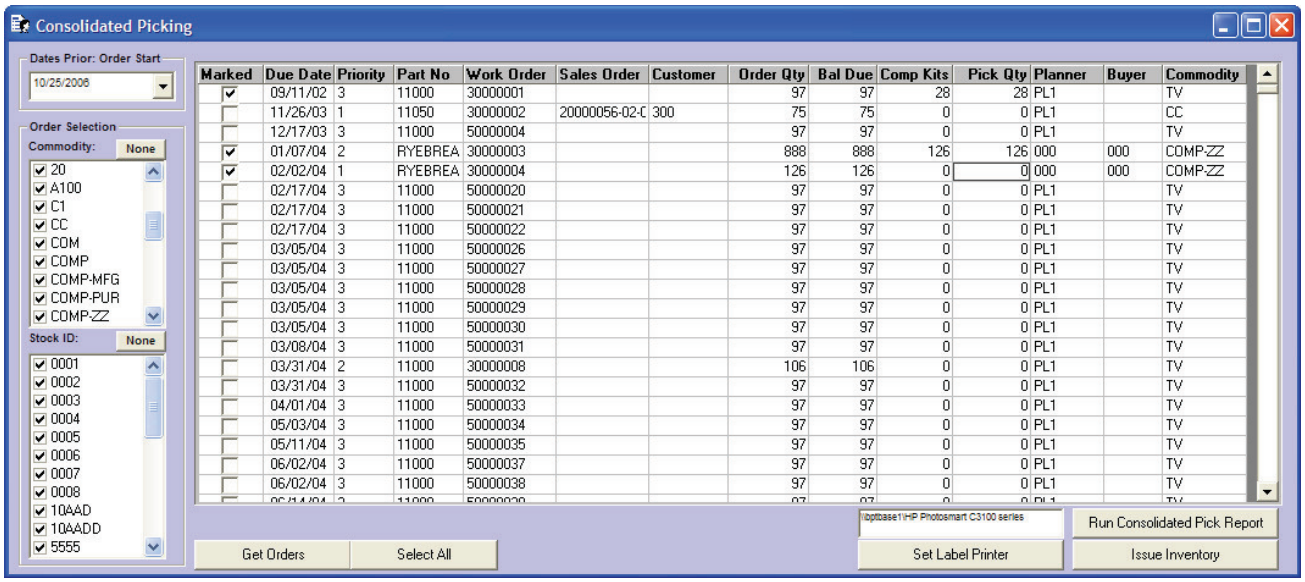
Buttons:

1. **Get Orders:** does the query to retrieve all the work orders which meet the selection criteria.
2. **Select All:** marks all the displayed orders. The first 4 characters of the REQUES_10 filed are set = “.cp.” to indicate Marked. The corresponding Requirement details have their UDFKEY_11 set in the same way. Positions 8 -11 contain a Pick Quantity in the format “0000”.
3. **Roll BackDue:** only is visible if Due Dates have been changed. This will undue the recent date changes. When the dates are changed ORGDUE_10 is set = CURDUE_10, CURDUE_10 is set to new date and VENID_10 is set = “.dc.”.
4. **Refresh:** sort and redisplay the current orders.
5. **Approve Orders:** promote marked orders from Status 1 to 2.
6. **Release Orders:** release marked approved orders setting their status codes to 3 and inserting the job progress data for each released order. Generated automatic replenishment orders for those parts which are short and have are under Kanban control.

Consolidated Shortage Report:

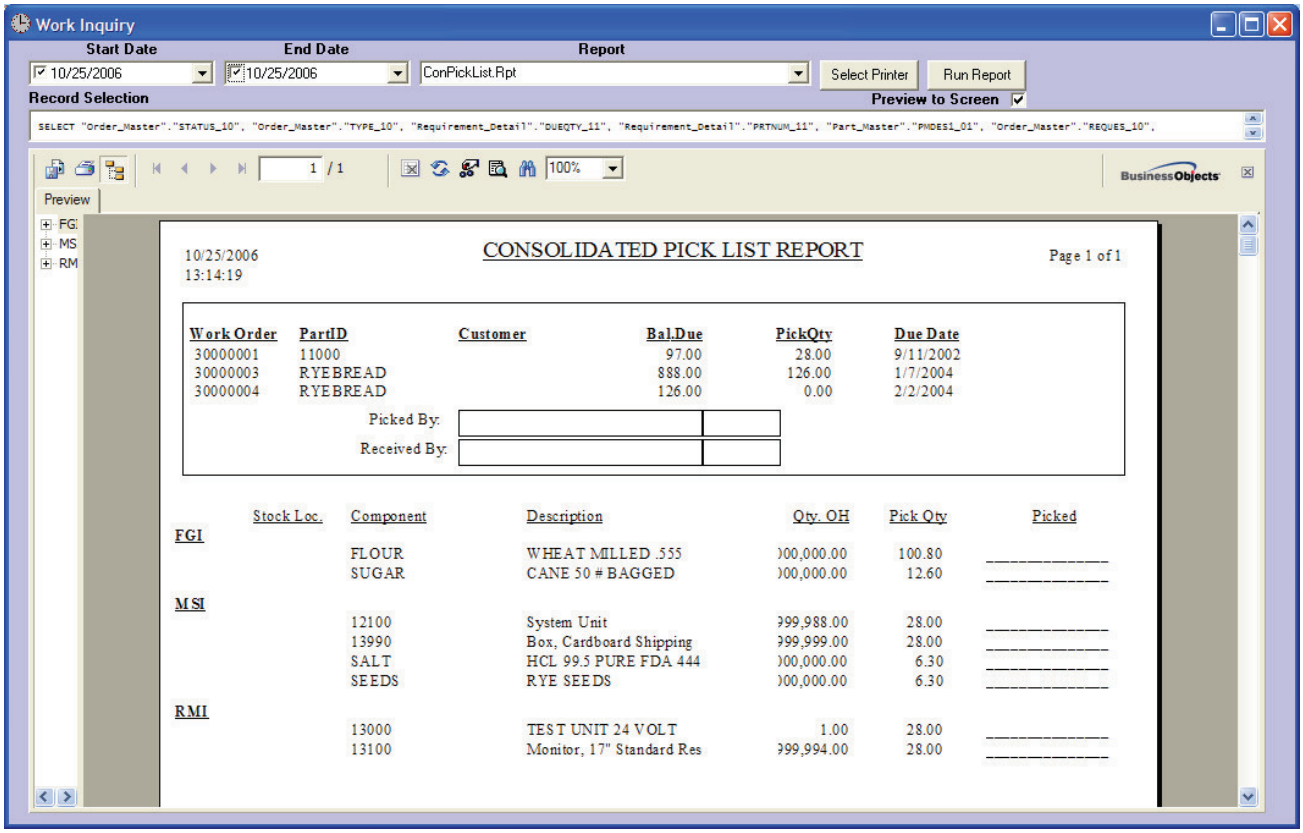


Pick Function:

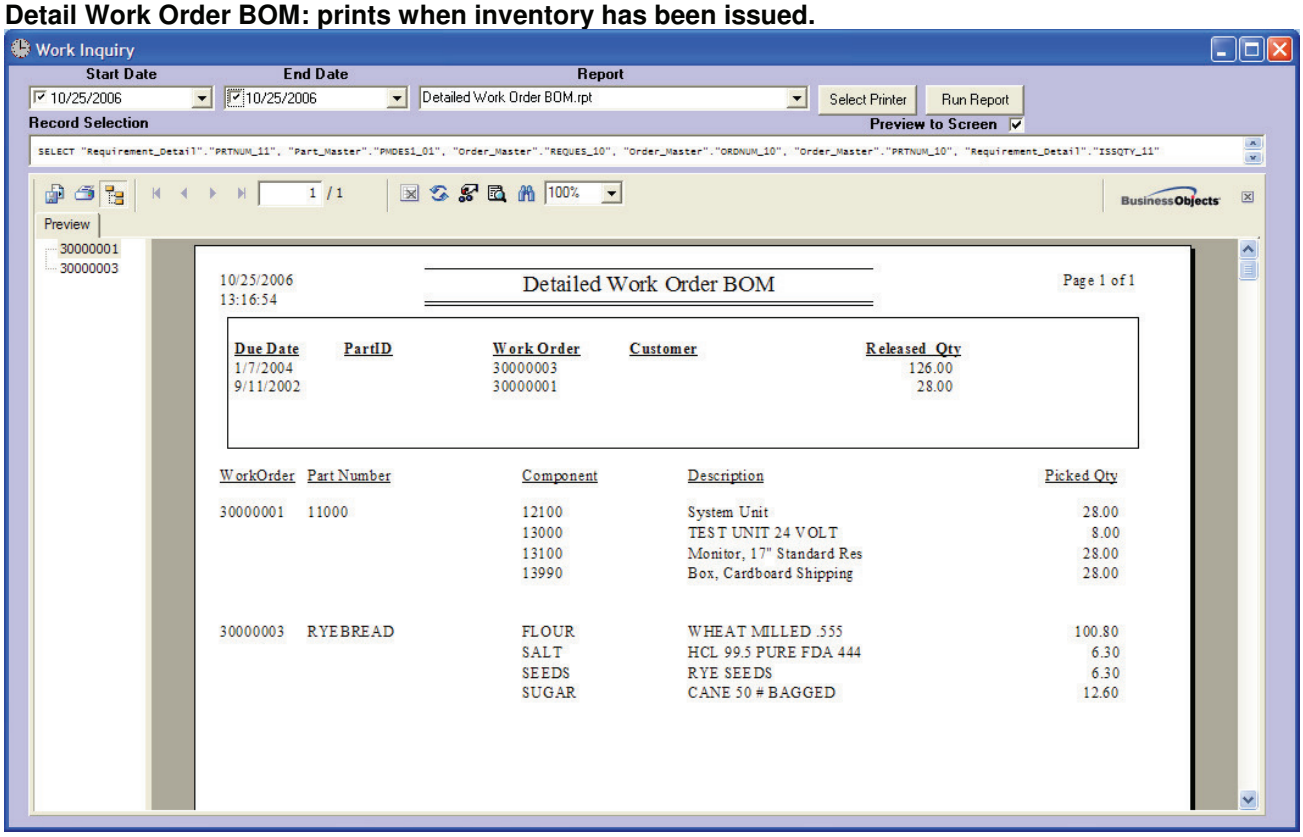


Orders are selected based on matching the checked models, and the checked Warehouse locations within the date range. Released orders will display.

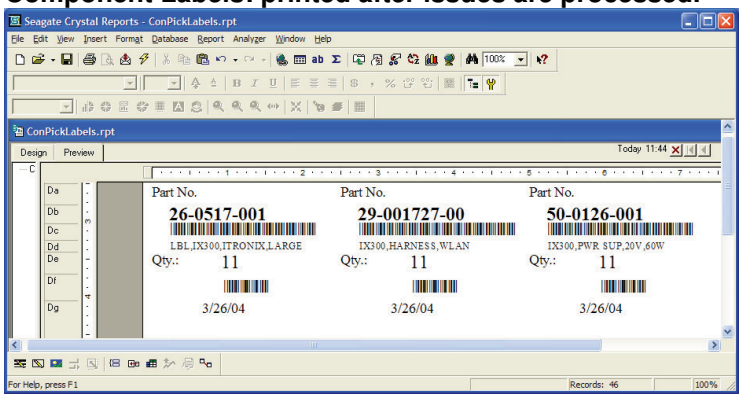
Consolidated Pick List:



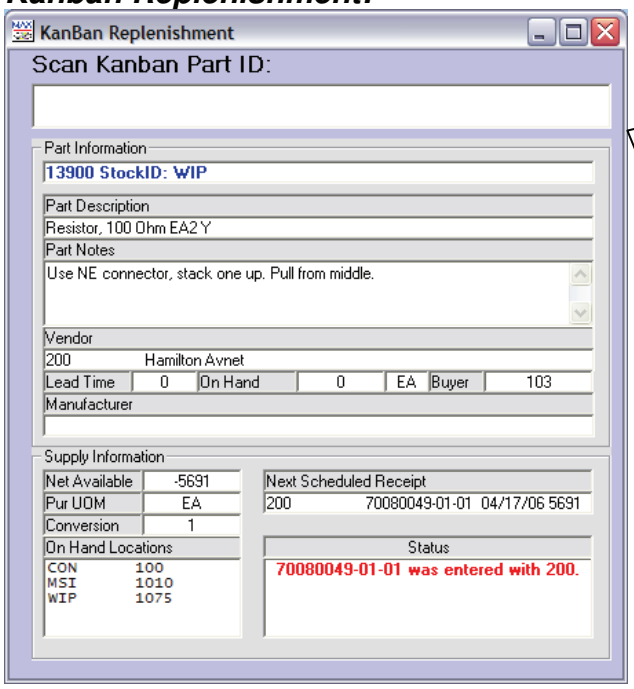
Detail Work Order BOM: prints when inventory has been issued.



Component Labels: printed after issues are processed.



Kanban Replenishment:

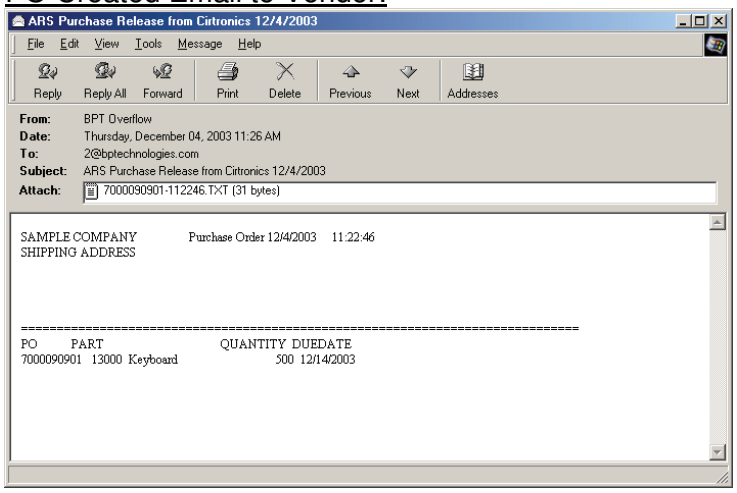


The only user input is the part and an optional deliver to stock ID.

If the part is an authorized Kanban part and matches the criteria to be order and new line item will be added to an existing Kanban purchase order if one exists or if none exists a new purchase order will be created.

An email can be sent immediately to vendor or a comprehensive email can be sent showing everything ordered for the day or since last sent.

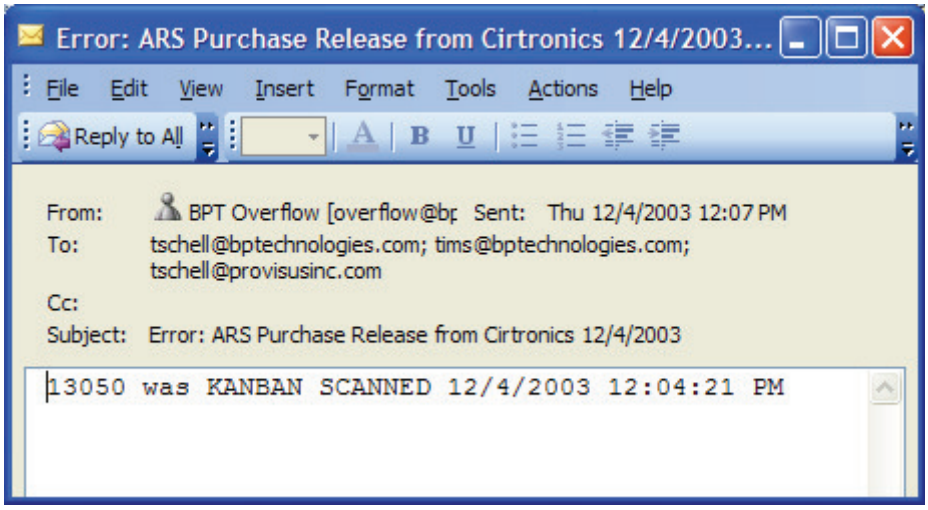
PO Created Email to Vendor:



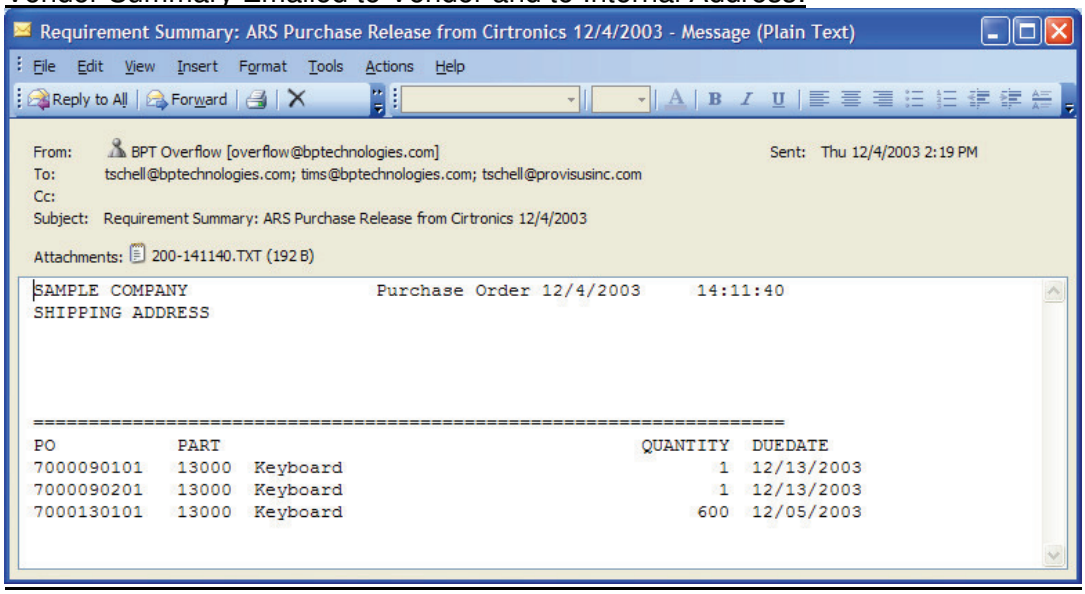
Attachment:

```
7000090901,13000,Keyboard,500,12/14/2003
```

Kanban scanned in Error Internal EMail:



Vendor Summary Emailed to Vendor and to Internal Address:

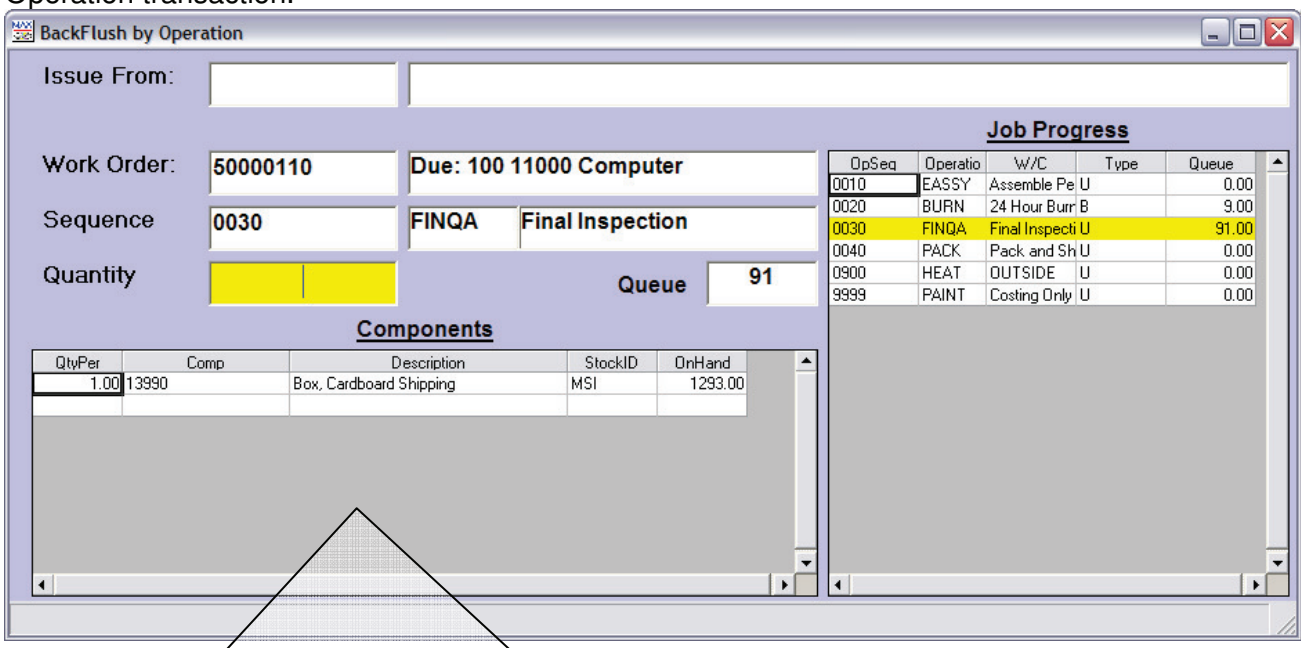


Summary Attachment:

```
7000090101,13000,Keyboard,1,12/13/2003
7000090201,13000,Keyboard,1,12/13/2003
7000130101,13000, Keyboard,600,12/05/2003
```

Back Flush By Operation:

This utility will issue components that have been identified to be picked using PickPro at the entered operation sequence. Optionally the operation quantity can be posted with a Post Operation transaction.



Issue From: will default based on the LeanMAX settings to be either the individual component default Stock ID, the Stock ID associated with the Work center (see below) or an entered Stock ID which overrides the defaults.

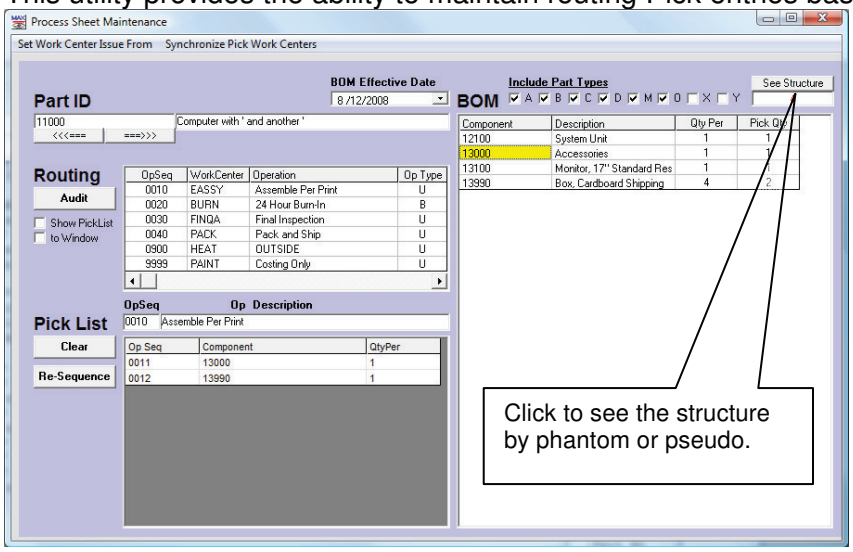
Work Order: open work order

Sequence: open operation

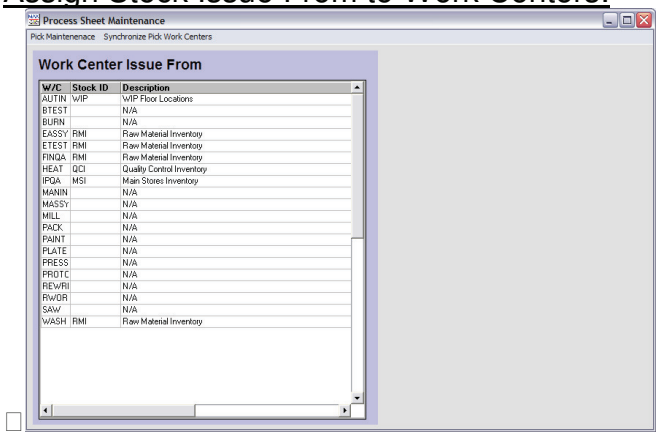
Quantity: quantity to back flush and/or post operation completion.

PickPro Function:

This utility provides the ability to maintain routing Pick entries based on the BOM of the part.



Assign Stock Issue From to Work Centers:



When a Part is selected the related sigle level exploded BOM(accounting for phantoms and pseudos) and Routing will display. When a particular Routing step is highlighted the Pick instructions which follow the selected operation will be display below.

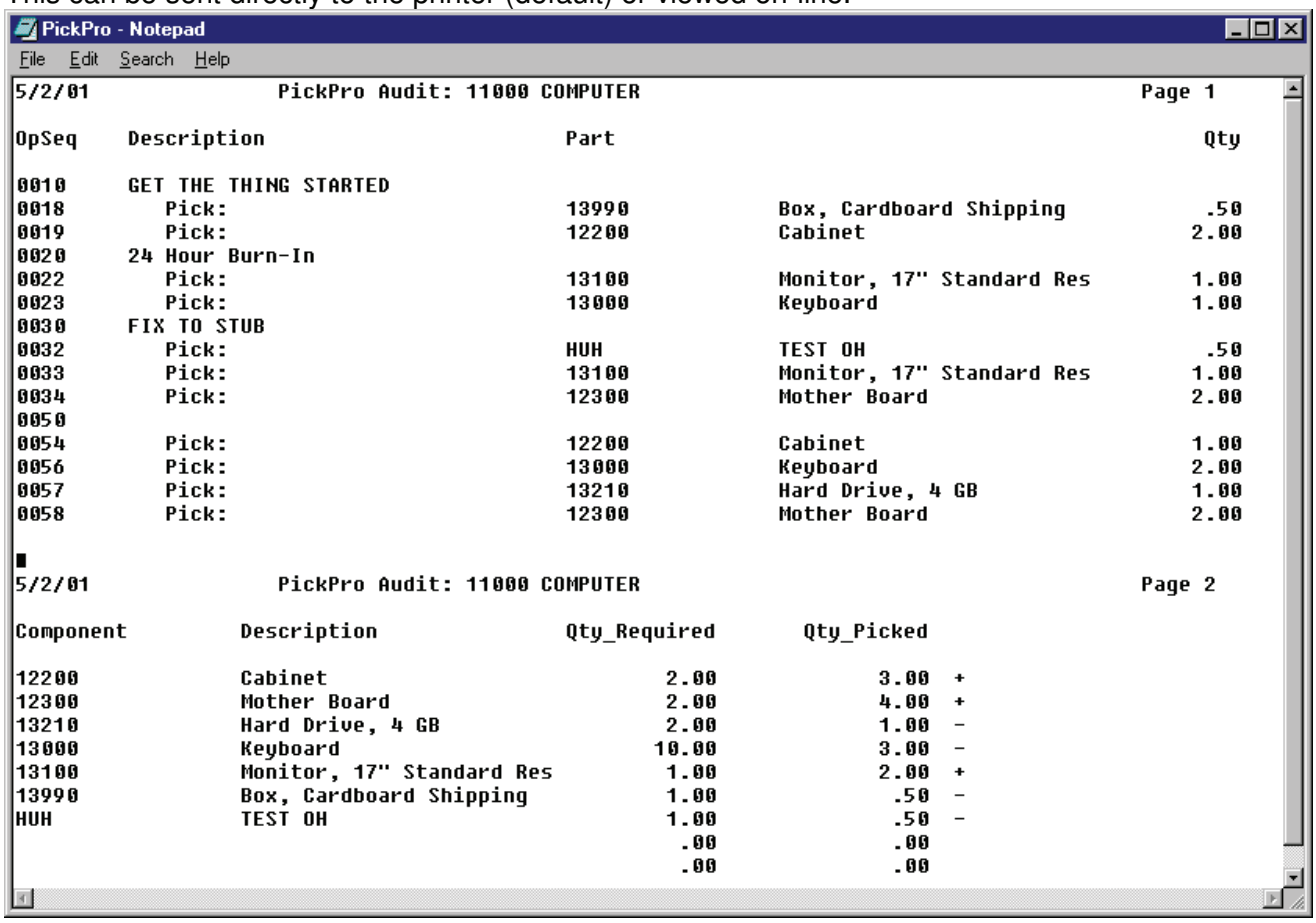
Pick entries are added by right-clicking on the component in the BOM frame and dragging over to the Pick List frame. Double clicking on the component will also move the component to the Pick List.To delete, reverse this move or change the quantity per to zero. Pick quantities can be changed to any quantity up to the total required quantity for that component.

Please note: this application allows you to enter the same part more than once within a routing and allows the quantity to be different than the required quantity on a given pick entry.

Synchronize Pick Work Centers: will audit the Pick operations to make sure the referenced Work center equals the linked to operation's work center.

Clear: will delete all of the Pick entries for a given operation.
Re Sequence: will renumber the Pick Entries.

Audit: will provide a quick quantity audit for a given part by comparing the BOM to the Pick entries. This can be sent directly to the printer (default) or viewed on-line.



PickPro - Notepad

File Edit Search Help

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OpSeq    Description                    Part                                      Qty

0010     GET THE THING STARTED
0018        Pick:                       13990          Box, Cardboard Shipping     .50
0019        Pick:                       12200          Cabinet                    2.00
0020     24 Hour Burn-In
0022        Pick:                       13100          Monitor, 17" Standard Res  1.00
0023        Pick:                       13000          Keyboard                   1.00
0030     FIX TO STUB
0032        Pick:                       HUH            TEST OH                     .50
0033        Pick:                       13100          Monitor, 17" Standard Res  1.00
0034        Pick:                       12300          Mother Board               2.00
0050
0054        Pick:                       12200          Cabinet                    1.00
0056        Pick:                       13000          Keyboard                   2.00
0057        Pick:                       13210          Hard Drive, 4 GB           1.00
0058        Pick:                       12300          Mother Board               2.00

5/2/01              PickPro Audit: 11000 COMPUTER                              Page 2

Component        Description             Qty_Required      Qty_Picked

12200            Cabinet                         2.00            3.00  +
12300            Mother Board                    2.00            4.00  +
13210            Hard Drive, 4 GB                2.00            1.00  -
13000            Keyboard                       10.00            3.00  -
13100            Monitor, 17" Standard Res       1.00            2.00  +
13990            Box, Cardboard Shipping         1.00             .50  -
HUH              TEST OH                         1.00             .50  -
                                                  .00             .00
                                                  .00             .00
```